



Wincanton

At the heart of British supply chains

Step By Step Guide

How to register on Wincanton's Oracle Cloud platform

Tab 1 - Company Details

Please complete all the necessary fields

Mandatory fields for completion:
Company Details:

- Company Trading Name
- Tax Organisation type
- D-U-N-S Number or Tax Country and VAT Registration Number (needs to begin with 'GB')

Contact Information

- First Name
- Last Name
- Email
- Confirm Email

Please note the contact provided here will become the account administrator to self manage your profile.

Select "Next" to proceed to Tab 2 - Contacts

Tab 2 - Contacts

Contacts for your account

Register Supplier: Contacts ⓘ

Enter at least one contact.

Actions ▾ View ▾ Format ▾ + Create ✎ Edit ✕ Delete 🧊 Freeze 📄 Detach ↵ Wrap

Name	Job Title	Email	Administrative Contact	Request User Account	Edit	Delete
Thind, Sandeep		Sandeep.thind@test.co.uk	✓	✓	✎	✕

Columns Hidden 7

This screen confirms the person noted as a contact from Tab 1, has been given administrative responsibilities for your supplier profile.

Should you wish to add any further contacts then please select “Actions” and “Create”. This can be done at any stage post registration should you wish to do this later.

Select “Next” to proceed to Tab 3 - Addresses

Tab 3 - Addresses

Setting up addresses against your record

Company Details | Contacts | **Addresses** | Bank Accounts | Question... | Review

Register Supplier: Addresses

Enter at least one address for remit-to and ordering address purposes.

Actions View Format + Create Edit Delete Freeze Detach Wrap

Create Edit Delete

Address

Select “Actions” on the left hand side and select “Create”.

You will need to add at least one address to assign PO and Remittance email addresses

Tab 3 - Addresses continued

Setting up addresses against your record

Create Address

* Address Name

* Country

* Address Line 1

Address Line 2

Address Line 3

* City or Town

County

Postcode

* Address Purpose Ordering
 Remit to
 RFQ or Bidding

Phone 44

Fax 44

Email

Address Contacts

Select the contacts that are associated with this address.

Actions View Format Freeze Detach Wrap

Name	Job Title	Email	Administrative Contact	User Account
No data to display.				
Columns Hidden 4				

Create Another OK Cancel

Please complete as follows:

- Address Name: Please populate with “Sales”
- Address Line 1
- City or Town
- Postcode
- Address Purpose: please select Ordering and/or Remit
- Email address: please populate this with the required email address. Please note if you select Ordering and Remit then both those emails will be sent to this email address.

If this needs to be different email addresses then please set up two different address locations.

Tab 4 - Bank Account

Bank account for payments to be made to

The screenshot shows a progress bar at the top with six steps: Company Details, Contacts, Addresses, Bank Accounts (highlighted with a blue circle and the number 4), Question..., and Review. Below the progress bar, the page title is "Register Supplier: Bank Accounts" with a help icon. A toolbar contains buttons for Actions, View, Format, Create, Edit, Delete, Freeze, Detach, and Wrap. The "Actions" dropdown menu is open, showing "Create", "Edit", and "Delete" options. Below the toolbar, a table is partially visible with columns for "Number" and "IBAN".

Select “Actions” on the left hand side and select “Create” to populate your bank account details. Please note you will not be able to proceed without completing this section.

In the ‘Note to Approver’ box if using factoring business place the word ‘FACTOR’ in the comments box

Tab 4 - Bank Account continued

Bank account for payments to be made to

Create Bank Account

Enter account number or IBAN unless account number is marked as required.

* Country
Bank
Branch
Account Number

IBAN
Currency

Additional Information

Account Name Agency Location Code
Alternate Account Name Account Type
Account Suffix Description
Check Digits

Comments

Note to Approver

Please complete the following as a minimum:

- Country
- Bank
- Branch (sort code)
- Account Number
- IBAN (if you have a UK branch than an IBAN number is not required. If you are transacting with a foreign bank then an IBAN number is required)
- Currency

Then select “Ok” and then when back on main screen select “Next” to continue on to Tab 5 - Questionnaire

Tab 5 - Questionnaire

Please complete

1. Please complete the questionnaire.
2. If you have insurances, then attach this document for each requirement in the questionnaire. In the text box associated with the attachment, type in the word 'attachment'
3. For non Self-Bill customers, attach a copy of your letter head in the questionnaire
4. Please note any missing answers or missing information will mean that the set up of your account will be delayed.
5. Once completed please select "Next" in the right hand corner to proceed to the final review screen.
6. If using a factoring business, then tick the box Y/N with a 'Yes' and answer the additional questions posed

Tab 6 - Review

Final review of all details being submitted



Review Supplier Registration: Test

Company Details

Company Test

Tax Organization Type Corporation

Supplier Type

Corporate Web Site

D-U-N-S Number 123456789

Tax Country

Taxpayer ID

Tax Registration Number

Note to Approver

Attachments

Actions View + x

Type	* File Name or URL	Title	Description	Attached By	Attached Date
No data to display.					
Columns Hidden 1					

Contacts

View Format Freeze Detach Wrap

Name	Job Title	Email	Administrative Contact	Request User Account	Details
Thind, Sandeep		Sandeep.thind@test.co.uk	✓	✓	
Columns Hidden 7					

Addresses

View Format Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Details
No data to display.				

Please review all the details and when satisfied select “Register”.

This will then be submitted to the Wincanton team to review and approve if appropriate.

Should you have any questions then please contact our dedicated supplier helpdesk:
 Email - supplier.helpdesk@wincanton-services.com

Telephone - 0844 736 2412 (UK)

Open 8:30am to 5:00pm Monday to Friday (excluding bank holidays)

Thank you